

# ELECTRONIC INFORMATION DISCLOSURE STATEMENT

Electronic Version v18

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## Title of Invention

Financial Planning Method and System

Application Number :

Confirmation Number:

First Named Applicant: Phillip Schwegmann

Attorney Docket Number: 031001

Art Unit:

Examiner:

Search string: ( 06275814 or 06611807 or 06625582 or 06601044 or 06456979 or 06360210 or 06253192 ).pn

Certification: This Information Disclosure Statement was submitted under the following conditions, which satisfies the requirement under 37 CFR 1.97(e). The filer certified:

That no item of information contained in the information disclosure statement was cited in a communication from a foreign patent office in a counterpart foreign application, and, to the knowledge of the person signing the certification after making reasonable inquiry, no item of information contained in the information disclosure statement was known to any individual designated in 37 CFR 1.56(c) more than three months prior to the filing of the information disclosure statement.

## US Patent Documents

**Note: Applicant is not required to submit a paper copy of cited US Patent Documents**

init	Cite.No.	Patent No.	Date	Patentee	Kind	Class	Subclass
	1	06275814	2001-08-14	Giansante et al.			
	2	06611807	2003-08-26	Bernheim et al.			
	3	06625582	2003-09-23	Richman et al.			
	4	06601044	2003-07-29	Wallman			
	5	06456979	2002-09-24	Flagg			
	6	06360210	2002-03-19	Wallman			
	7	06253192	2001-06-26	Corlett et al.			

## Signature

Examiner Name	Date
/Irene Kang/	06/16/2008

ALL REFERENCES CONSIDERED EXCEPT WHERE LINED THROUGH. /I.K./